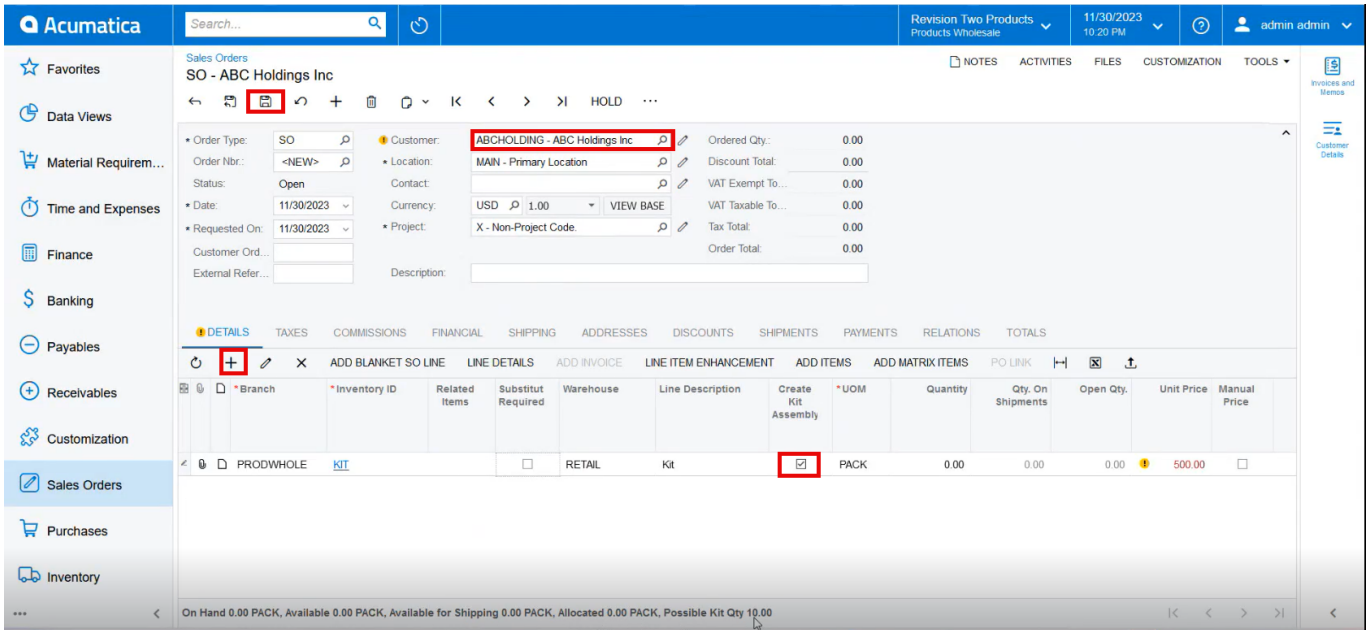


Create Kit Assembly on Sales Orders Save

- ✖ You must navigate to the left panel of Acumatica and click on **[Inventory]** and then click on **[Stock Items]** under **[Profiles]**.
- Search for the **[Customer]**.
- Click on the **[+]** icon.
- Search for **[Branch]**, **[Warehouse]**.
- Enable the check box for **[Create Kit Assembly]**.

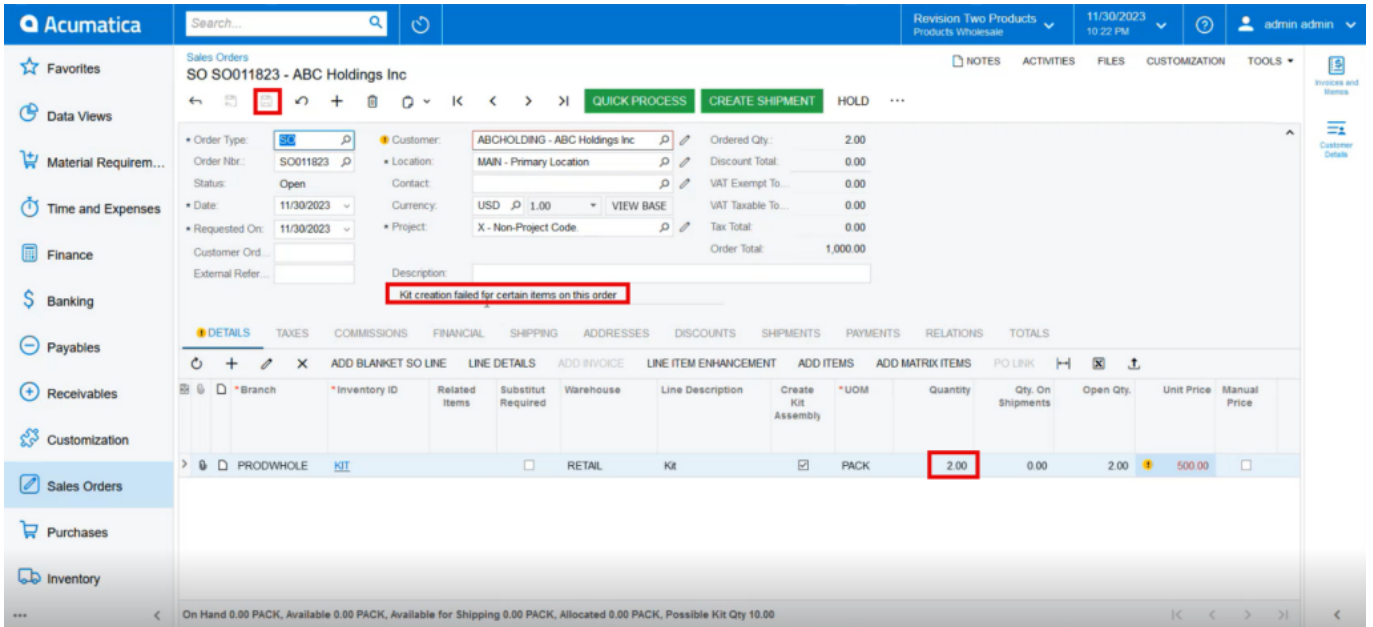


The screenshot shows the Acumatica interface for a sales order. The top navigation bar includes 'Acumatica', a search bar, and user information. The left sidebar shows navigation options like 'Favorites', 'Data Views', 'Material Requirement...', 'Time and Expenses', 'Finance', 'Banking', 'Payables', 'Receivables', 'Customization', 'Sales Orders', 'Purchases', and 'Inventory'. The main area displays the sales order details for 'SO - ABC Holdings Inc'. A table at the bottom shows the order lines, with the 'Create Kit Assembly' checkbox checked for the 'PACK' line.

| Branch | Inventory ID | Related Items | Substitut Required | Warehouse | Line Description | Create Kit Assembly | UOM | Quantity | Qty. On Shipments | Open Qty. | Unit Price | Manual Price |
|-----------|--------------|---------------|--------------------|-----------|------------------|-------------------------------------|------|----------|-------------------|-----------|------------|--------------|
| PRODWHOLE | KIT | | | RETAIL | Kit | <input checked="" type="checkbox"/> | PACK | 0.00 | 0.00 | 0.00 | 500.00 | |

Sales Orders

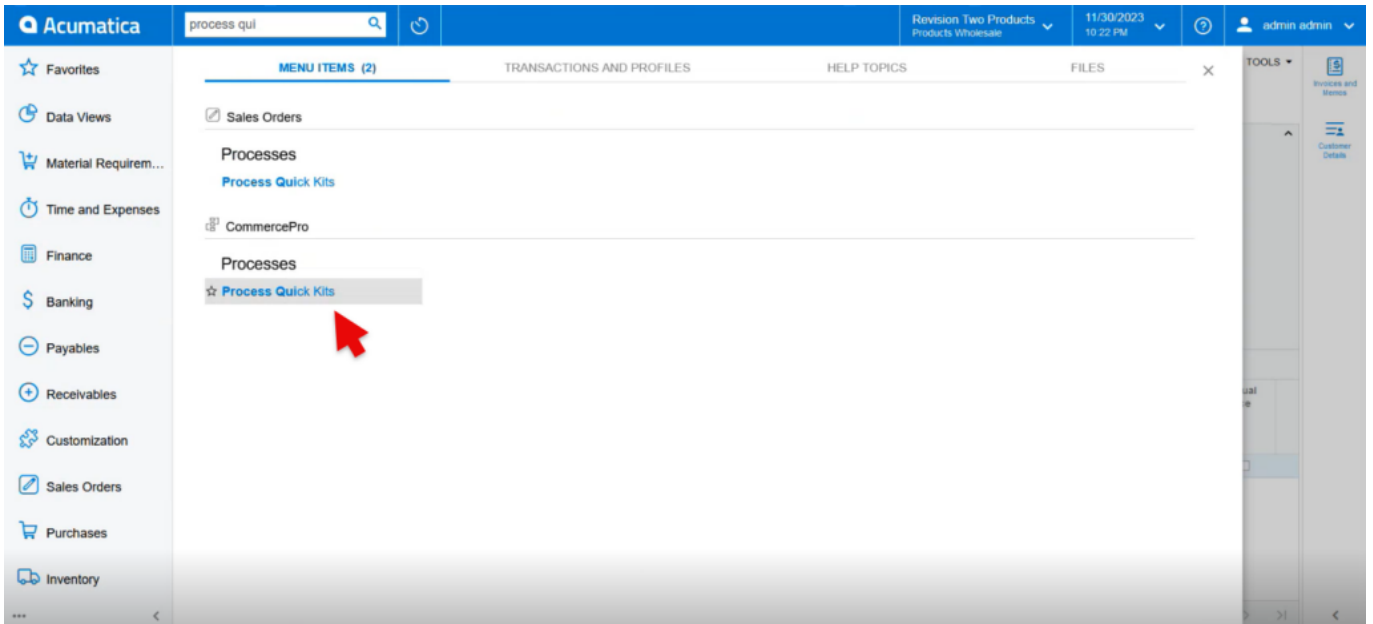
- Enter the required kit **[Quantity]**.
- Click on **[save]**.
- If it is not processed, you will get a validation as **[Kit creation failed certain items on this order]**.



The screenshot shows the Acumatica Sales Order interface for order SO0011823. The top navigation bar includes the Acumatica logo, a search bar, and user information. The left sidebar lists various business functions like Favorites, Data Views, and Sales Orders. The main content area displays order details such as Customer (ABC HOLDING - ABC Holdings Inc), Location (MAIN - Primary Location), and Order Type (SO). A table below shows line items, with one item highlighted: a KIT with a quantity of 2.00 and a unit price of 500.00. A red box highlights the 'KIT' label in the table, and another red box highlights a message: 'Kit creation failed for certain items on this order'.

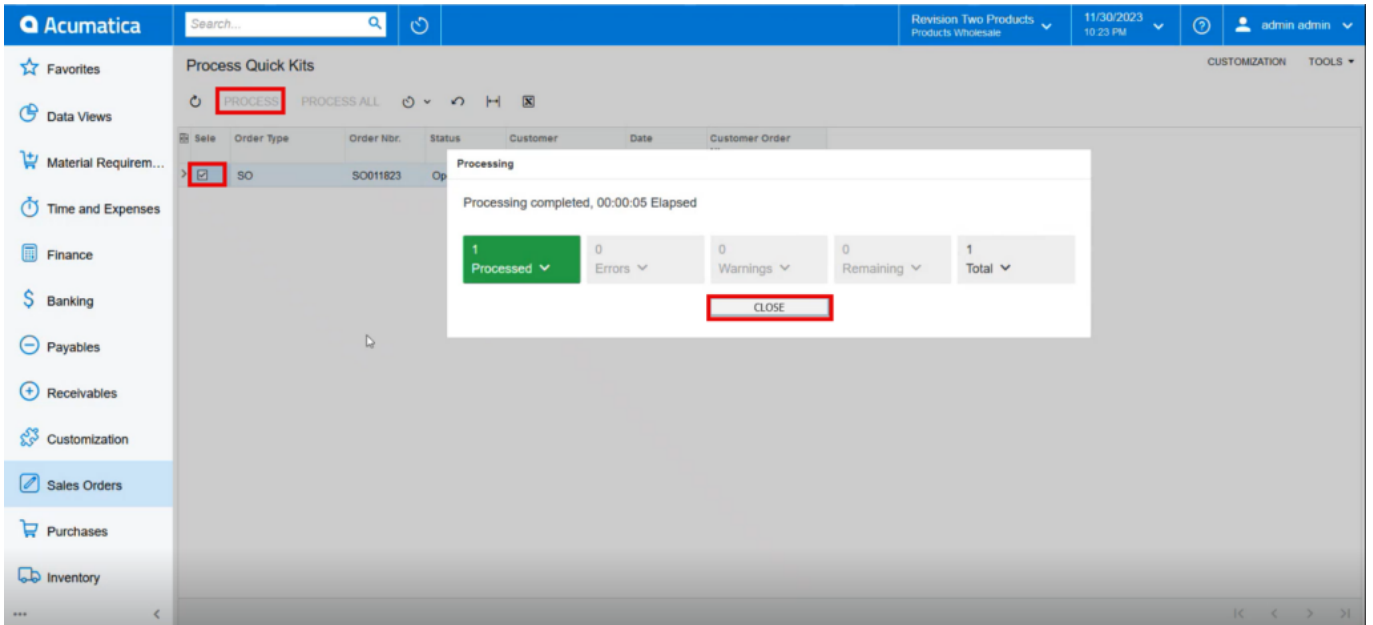
Sales Orders

- You must search for **[Process Quick Kits]** in the Global search bar.



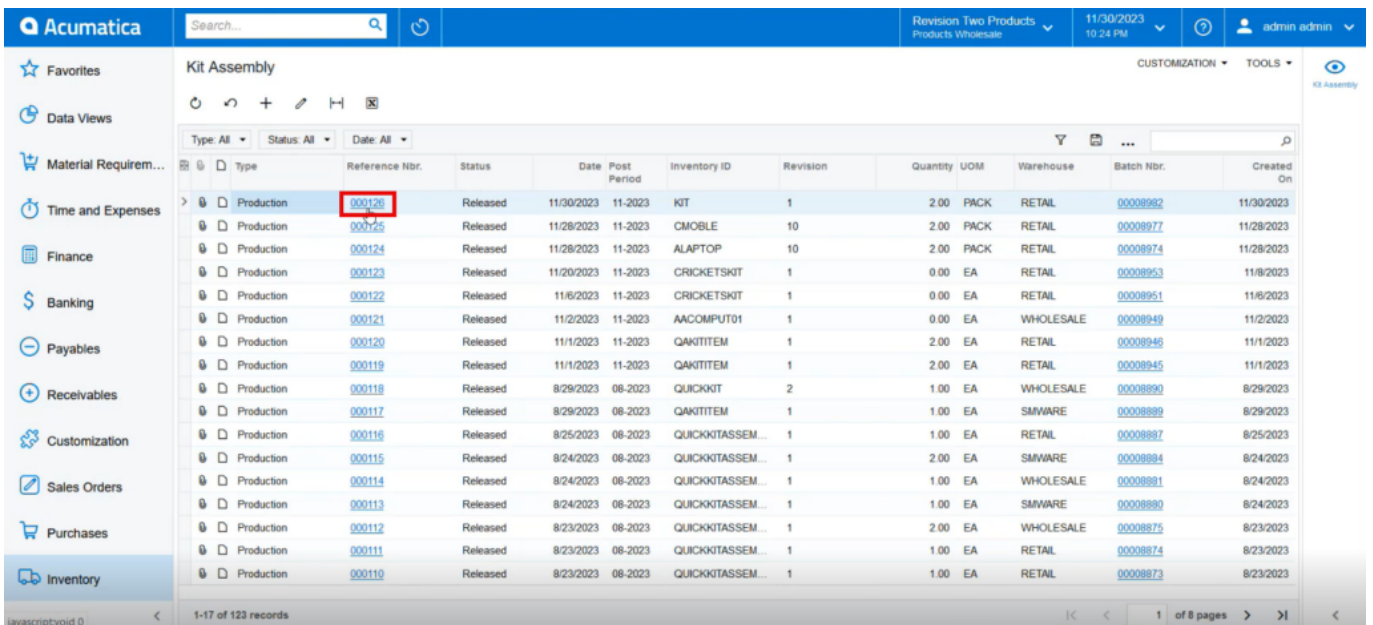
The screenshot shows the Acumatica search results page. The search bar at the top contains the text 'process qui'. The results are categorized under 'MENU ITEMS (2)'. Under the 'Sales Orders' category, there is a sub-section for 'Processes' which includes 'Process Quick Kits'. A red arrow points to the 'Process Quick Kits' link, which is highlighted with a grey background.

Process Quick Kits



Process Quick Kits

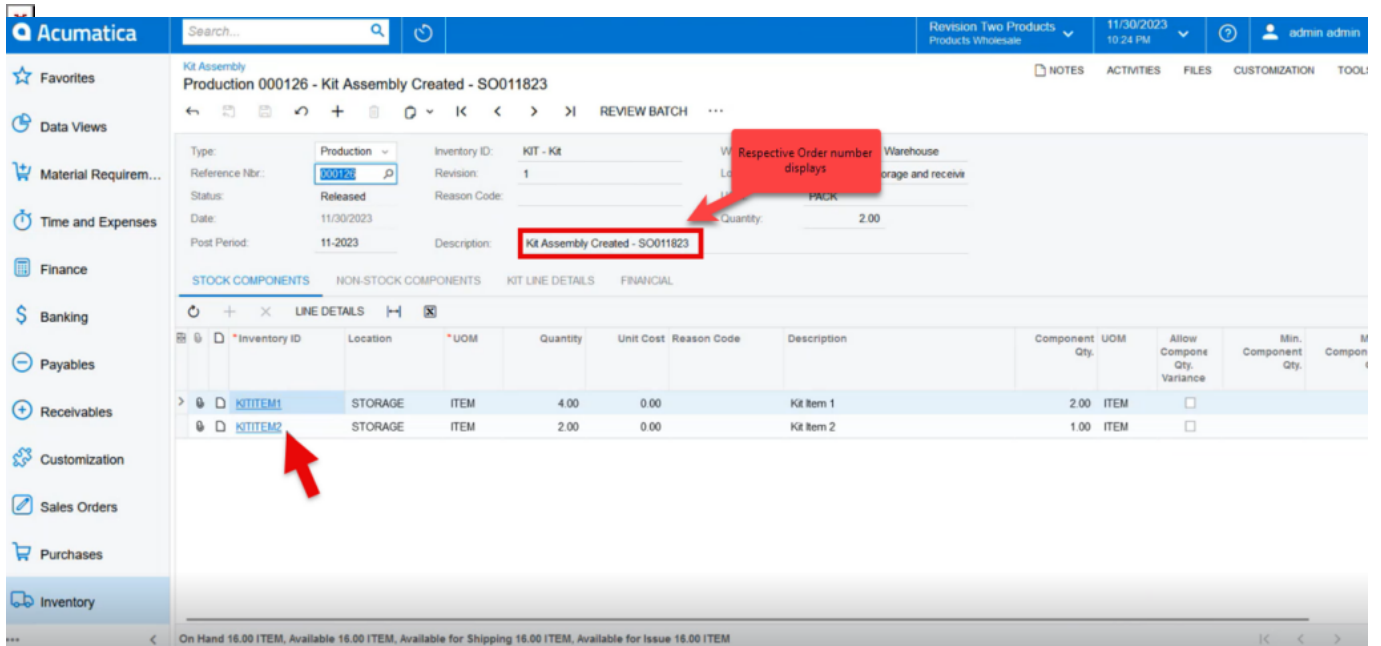
- To view the processed order, you must search for **[Kit Assembly]** in the Global search bar.



| Type | Reference Nbr. | Status | Date | Post Period | Inventory ID | Revision | Quantity | UOM | Warehouse | Batch Nbr. | Created On |
|------------|----------------|----------|------------|-------------|------------------|----------|----------|------|-----------|------------|------------|
| Production | 000120 | Released | 11/30/2023 | 11-2023 | KIT | 1 | 2.00 | PACK | RETAIL | 00008982 | 11/30/2023 |
| Production | 000125 | Released | 11/28/2023 | 11-2023 | CMOBLE | 10 | 2.00 | PACK | RETAIL | 00008977 | 11/28/2023 |
| Production | 000124 | Released | 11/28/2023 | 11-2023 | ALAPTOP | 10 | 2.00 | PACK | RETAIL | 00008974 | 11/28/2023 |
| Production | 000123 | Released | 11/20/2023 | 11-2023 | CRICKETSKIT | 1 | 0.00 | EA | RETAIL | 00008953 | 11/8/2023 |
| Production | 000122 | Released | 11/6/2023 | 11-2023 | CRICKETSKIT | 1 | 0.00 | EA | RETAIL | 00008951 | 11/6/2023 |
| Production | 000121 | Released | 11/2/2023 | 11-2023 | AACOMPUT01 | 1 | 0.00 | EA | WHOLESALE | 00008949 | 11/2/2023 |
| Production | 000120 | Released | 11/1/2023 | 11-2023 | QAKITITEM | 1 | 2.00 | EA | RETAIL | 00008946 | 11/1/2023 |
| Production | 000119 | Released | 11/1/2023 | 11-2023 | QAKITITEM | 1 | 2.00 | EA | RETAIL | 00008945 | 11/1/2023 |
| Production | 000118 | Released | 8/29/2023 | 08-2023 | QUICKKIT | 2 | 1.00 | EA | WHOLESALE | 00008890 | 8/29/2023 |
| Production | 000117 | Released | 8/29/2023 | 08-2023 | QAKITITEM | 1 | 1.00 | EA | SMWARE | 00008889 | 8/29/2023 |
| Production | 000116 | Released | 8/25/2023 | 08-2023 | QUICKKITASSEM... | 1 | 1.00 | EA | RETAIL | 00008887 | 8/25/2023 |
| Production | 000115 | Released | 8/24/2023 | 08-2023 | QUICKKITASSEM... | 1 | 2.00 | EA | SMWARE | 00008884 | 8/24/2023 |
| Production | 000114 | Released | 8/24/2023 | 08-2023 | QUICKKITASSEM... | 1 | 1.00 | EA | WHOLESALE | 00008881 | 8/24/2023 |
| Production | 000113 | Released | 8/24/2023 | 08-2023 | QUICKKITASSEM... | 1 | 1.00 | EA | SMWARE | 00008880 | 8/24/2023 |
| Production | 000112 | Released | 8/23/2023 | 08-2023 | QUICKKITASSEM... | 1 | 2.00 | EA | WHOLESALE | 00008875 | 8/23/2023 |
| Production | 000111 | Released | 8/23/2023 | 08-2023 | QUICKKITASSEM... | 1 | 1.00 | EA | RETAIL | 00008874 | 8/23/2023 |
| Production | 000110 | Released | 8/23/2023 | 08-2023 | QUICKKITASSEM... | 1 | 1.00 | EA | RETAIL | 00008873 | 8/23/2023 |

Kit Assembly

- Click on **[Reference Nbr.]**.
- In the description, you can view the **[kit Assembly created with SO no]**.



Acumatica

Search...

Revision: Two Products
Products Wholesale

11/30/2023
10:24 PM

admin admin

Kit Assembly
Production 000126 - Kit Assembly Created - SO011823

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

← → REVIEW BATCH ...

Type: Production
Inventory ID: KIT - Kit
Warehouse: Storage and receive

Reference Nbr.: 0001823
Revision: 1
Quantity: 2.00

Status: Released
Reason Code: PACK

Date: 11/30/2023
Post Period: 11-2023
Description: Kit Assembly Created - SO011823

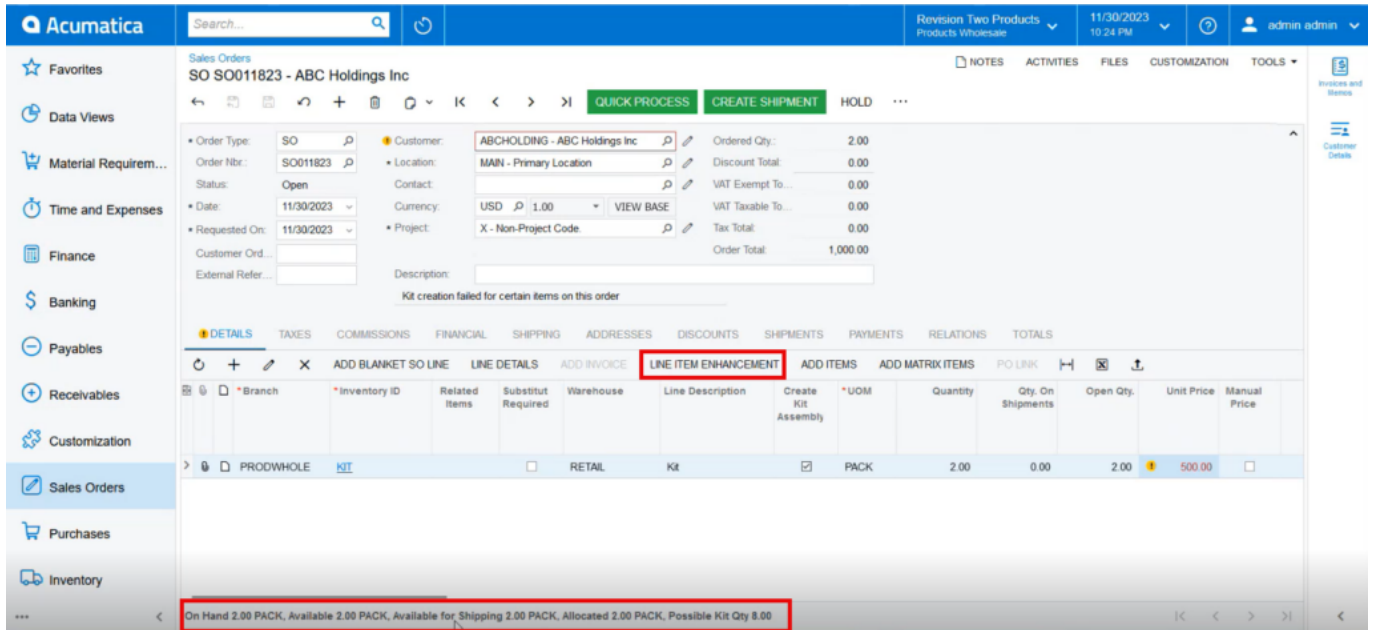
STOCK COMPONENTS NON-STOCK COMPONENTS KIT LINE DETAILS FINANCIAL

| Inventory ID | Location | UOM | Quantity | Unit Cost | Reason Code | Description | Component Qty. | UOM | Allow Component Qty. Variance | Min. Component Qty. | Max. Component Qty. |
|--------------|----------|------|----------|-----------|-------------|-------------|----------------|------|-------------------------------|---------------------|---------------------|
| KITITEM1 | STORAGE | ITEM | 4.00 | 0.00 | | Kit Item 1 | 2.00 | ITEM | <input type="checkbox"/> | | |
| KITITEM2 | STORAGE | ITEM | 2.00 | 0.00 | | Kit Item 2 | 1.00 | ITEM | <input type="checkbox"/> | | |

On Hand 16.00 ITEM, Available 16.00 ITEM, Available for Shipping 16.00 ITEM, Available for Issue 16.00 ITEM

Kit Assembly

- Navigate to the sales orders screen and check the possible kit quantity. If the quantity is less than the possible kit quantity, this indicates that kit has been Created and quantity is forwarded to Parent item.



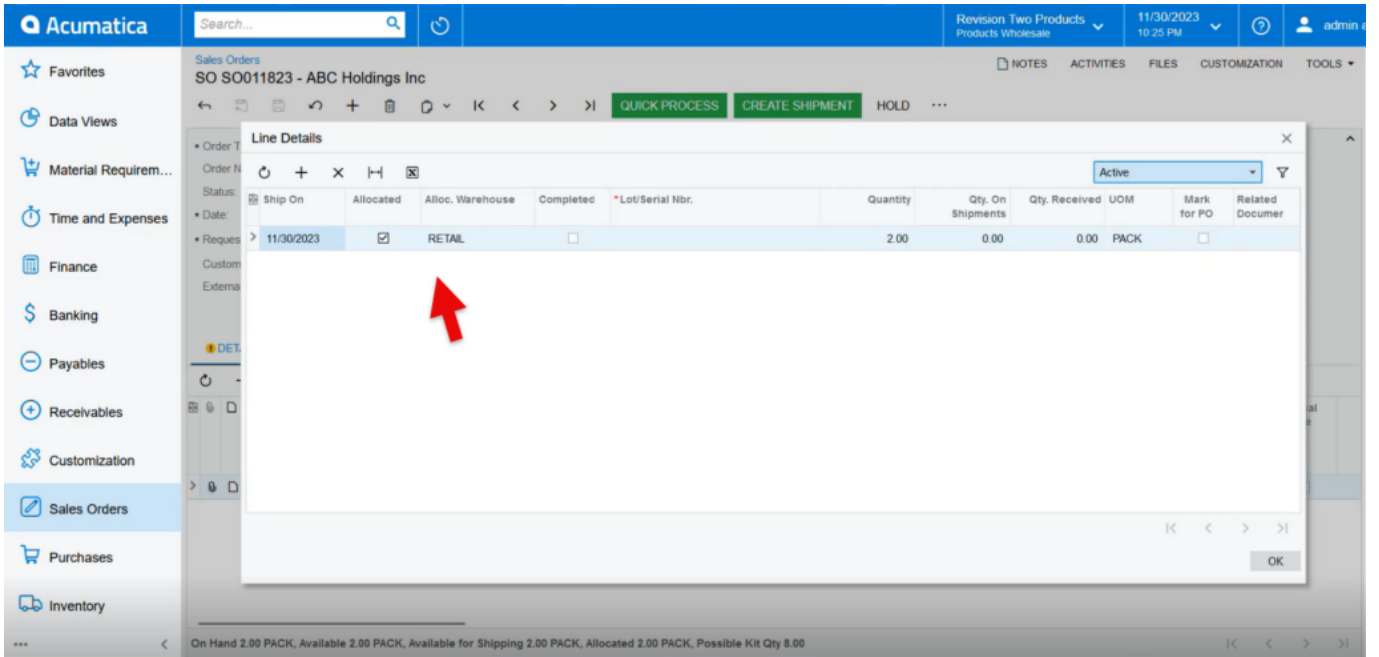
The screenshot shows the Acumatica Sales Order interface for order SO SO011823. The 'LINE ITEM ENHANCEMENT' tab is selected and highlighted with a red box. Below this, a table displays the order line details:

| Branch | Inventory ID | Related Items | Substitut Required | Warehouse | Line Description | Create Kit Assembly | UOM | Quantity | Qty. On Shipments | Open Qty. | Unit Price | Manual Price |
|-----------|--------------|---------------|--------------------|-----------|------------------|-------------------------------------|------|----------|-------------------|-----------|------------|--------------|
| PRODWHOLE | KIT | | | RETAIL | Kit | <input checked="" type="checkbox"/> | PACK | 2.00 | 0.00 | 2.00 | 500.00 | |

At the bottom of the screen, a status bar is highlighted with a red box, containing the text: "On Hand 2.00 PACK, Available 2.00 PACK, Available for Shipping 2.00 PACK, Allocated 2.00 PACK, Possible Kit Qty 8.00".

Sales Orders

- Click on **[Line Item Enhancement]**.
- This screen shows the allocated quantity for the order.



The screenshot shows the Acumatica software interface. At the top, there is a navigation bar with 'Acumatica' and a search field. Below it, a sidebar lists various modules like Favorites, Data Views, Material Requirement..., Time and Expenses, Finance, Banking, Payables, Receivables, Customization, Sales Orders, Purchases, and Inventory. The main area displays a 'Sales Orders' window for 'SO SO011823 - ABC Holdings Inc'. A 'Line Details' dialog box is open, showing a table with the following data:

| Ship On | Allocated | Alloc. Warehouse | Completed | Lot/Serial Nbr. | Quantity | Qty. On Shipments | Qty. Received | UOM | Mark for PO | Related Documer |
|------------|-------------------------------------|------------------|--------------------------|-----------------|----------|-------------------|---------------|------|--------------------------|-----------------|
| 11/30/2023 | <input checked="" type="checkbox"/> | RETAIL | <input type="checkbox"/> | | 2.00 | 0.00 | 0.00 | PACK | <input type="checkbox"/> | |

A red arrow points to the 'Allocated' checkbox in the first row. The status bar at the bottom indicates: 'On Hand 2.00 PACK, Available 2.00 PACK, Available for Shipping 2.00 PACK, Allocated 2.00 PACK, Possible Kit Qty 8.00'.

Line Details